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ABSTRACT

This document describes how the plan for a National Task Bank evolved as part of an effort to encourage State and local public welfare agencies to adopt new approaches to staff planning and utilization. The task bank is an outgrowth of the application of systems approach and functional job analysis to agency management. Individualized data banks for specific tasks were developed by local agencies and each task was described on a Keysort card. The cards for all of the tasks provided a means of manipulating data at the operating level. Among the potential uses of the data bank are: (1) exchange of information among States, (2) planning for training and educational needs, (3) national program planning, (4) State manpower planning, and (5) standardization of language used to describe worker activities. As the initial input was relatively small, operations were begun in a manual mode rather than attempting to develop a more expensive automated system. The future of the program will depend on State and local agency activities in the area of functional job analysis, resulting in the generation of task statements, and on continued financial and administrative support from the Social and Rehabilitation Service. Related documents are available as VT 020 661 and VT 020 663 in this issue. (MF)

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A NATIONAL TASK BANK

The first edition of the National Task Bank (publication in Spring, 1973) is a presentation of 550 individual tasks performed by persons who deliver Public Welfare Services and money payments to clients or participate in local agency activities related to these activities. While the first edition of the task bank contains introductory material which describes its development, the nature and composition require that users have a thorough knowledge of the use of Functional Job Analysis in order to obtain full benefit from information in the task bank.

Office of Manpower Development and Training
Division of Manpower Systems
March, 1973

VT020662

Major Events Leading to Establishment
of
The National Task Bank

1960 to 1965 — Developmental Activities on Differential use of staff

Adaptation of Systems Approach and Functional Job Analysis (FJA) to Social Welfare

1965 to 1970 — Training of Federal Manpower Staff and Middle Management Workers in 30 States in Systems Approach and FJA

Application of Techniques in 8 States and 2 SRS Administrations

1970 to 1971 — Task Analysis and Development of Task Statements and Task Banks at Operating Agencies

Design of a National Task Bank

Planning for extending Program to additional States and Program Areas

1972 to 1973 — Assembly of Tasks for National Task Bank

Editing of Tasks and Related Data

Planning for use and management of National Task Bank

Development of FJA Training Package

1973 — Publication of First Edition of National Task Bank

Training in Systems Approach and FJA for Staff from 10 additional States and University Faculty

Potential uses of the National Task Bank

1. Exchange of information among states (to help avoid duplication of effort)
2. An instrument for use in long range planning for training needs and educational needs, for example, curriculum design.
3. An aid to national program planners who can benefit from firsthand knowledge of service delivery activities.
4. An aid to state Manpower planners to make possible more effective delivery of services.
5. The means to standardize the language used to describe worker activities so that more effective communication of service delivery information among states can occur.

A NATIONAL TASK BANK

The first edition of the National Task Bank (publication in Spring, 1973) is a presentation of 550 individual tasks performed by persons who deliver Public Welfare Services and money payments to clients or participate in local agency activities related to these activities. A plan for a National Task Bank in the Office of Manpower Development and Training evolved as part of effort by the Social and Rehabilitation Service to encourage State and local agencies to adopt new approaches to manpower planning and utilization.[1/] The need for change arose from a broad range of causitive factors. These include the needs and aspirations of individual workers and a desire to make SRS services more responsive to client needs.

1/ Staffing patterns which developed in most agencies limited service delivery functions to workers holding graduate or undergraduate degrees. Many agencies have now moved to differential use of staff, dividing work among a range of personnel: paraprofessionals, technicians and professionals.

Agencies are being asked to meet growing service requirements with diminishing resources, and to make harder budget justifications. There are requirements that clients themselves be employed and there are rapidly changing legislative mandates. Under these conditions agency staffs have to be highly flexible and skillful. To help agencies respond to these pressures, SRS has coordinated the use of a variety of resources to develop personnel at local agencies.[1/] Technical assistance has been made available from Regional and Central offices.

The National Task Bank is an outgrowth of the application of Systems approach and Functional Job Analysis to agency management, particularly its manpower aspects.

The principle techniques utilized in this system were developed by Dr. Sidney Fine of the W.E. Upjohn Institute for Employment Research. Dr. Fine has adapted systems theory to use by social welfare agencies faced with service delivery and manpower utilization problems.

1/ These include long term support of graduate and undergraduate education programs, short term training activities, programs aimed at training and employment of the disadvantaged or other particular groups as well as the development of curricula, teaching methods and a variety of manpower management aids.

Starting in 1968 a series of workshops and training sessions was inaugurated under the title of "A Systems Approach to Task Analysis and Job Design." The methods taught help an agency to more clearly establish its goals and objectives and analyze its structure and operation. Once an agency has achieved a clear understanding of what it is trying to accomplish, the second part of the system comes into play. This involves a detailed analysis of what specific tasks workers carry out in order to accomplish agency goals.[1/]

Local Agency Task Banks. Following the application of the systems approach and the utilization of functional job analysis, local agencies have developed individualized task banks. These task banks are used for activities such as:

development of work designs for individual agency functions

development of training curricula

1/ See Sidney A. Fine, "An Introduction to Functional Job Analysis" (Kalamazoo, Michigan: W.E. Upjohn Institute for Employment Research, 1971). In this monograph Dr. Fine discusses work analysis and job design.

recording and application of performance standards

design of worker growth and development programs

development of career ladders and patterns of worker utilization

forecasting staff needs for pricing out program projections and for budget justification

The Upjohn Institute for Employment Research has devised a model task bank which employs Royal McBee Keysort cards. A sample of one of these cards is attached. Each card contains a single task statement and other information about level of difficulty, performance standards, training content, etc. Space is provided for administrative information, organizational identification and relationships to goals and objectives. This system provides a convenient means of manipulating data at the operating agency level. This system or a comparable one is being utilized by a number of local agencies.

Development of First Edition. In the late 1960's and early 1970's eight states,[1/] conducted Functional Job Analysis programs.

1/ South Carolina, Oregon, New Mexico, Wisconsin, Michigan Utah, Ohio, Iowa. The state of Utah has published a final report on its SRS demonstration project No. 11-P-5705218-02 entitled "A Systems Approach to Manpower Utilization and Training.

Each was asked to contribute the products of its task analysis efforts for use in assembling a National Task Bank. Two SRS administrations also contributed analysis of activities in the areas of child welfare[1/] and assistance payments.[2/]

In all, about 4500 tasks were assembled at SRS which contracted with the Upjohn Institute to develop the National Task Bank. The procurement contract calls for the following products:

1. A number of edited task statements, each with related data, the number to be determined in the process of editing. The material should be ready for placement in the SRS Task Bank in a format to be specified by SRS.
2. Identification of a core of benchmark tasks for each program area included in the material provided by SRS.

1/ The Community Services Administration of SRS and the Office of Child Development cooperated in development of a guide entitled "Differential Use of Staff in Family and Child Welfare Services," USDHEW, 1970.
2/ The Assistance Payments Administration of SRS has published a guide entitled "Task Analysis and Job Design For Public Assistance Agencies as Illustrated by Eligibility Determination", APA, 1973.

These tasks should illustrate the nature of services rendered by workers in each of these program areas insofar as this is possible within the limits imposed by the nature of the material provided by SRS. (Material to be provided is not expected to cover many service areas, and may not provide full coverage of all of these).

3. A manual which established standards for task editing process which is developed as a part of this procurement. As used in this procurement the "editing process" is expected to include interpretation of the technical language of functional job analysis as used by staff of the W.E. Upjohn Institute for Employment Research, state agencies engaged in preparation of task statements and SRS so that the finalized task statements represent a meeting of the minds among these groups. Standard definitions of key terms should be included as part of the manual.

Elimination of duplicates and editing of the 4500 tasks produced a total of 550 task statements. Each task is coded for identification purposes and rated on the various functional job analysis scale.[1/]

1/ op. cit. p. 2 see pp. 31-76 for explanation of scales.

Presentation format is identical to that of the Upjohn task bank cards so that the data may conveniently be transferred to this system for use at State and local agencies. For local applications editors in the field will need to modify task statements in the National Task Bank to fit specific situations. Copies of the task bank will be made available in printed form to all SRS Administrations, Regional offices and to any state which wishes to initiate a program of functional job analysis. A potential exists for expanding the first edition of the task bank to include the full range of tasks which must be performed in the delivery of all SRS services.

Even in its present limited form the task bank is a source of information for those examining agency activities and a means by which states entering task analysis programs can benefit from the preceding efforts of other agencies. Among its potential uses are:

1. Exchange of information among states (to help avoid duplication of effort)
2. An instrument for use in long range planning for training needs and educational needs, for example, curriculum design.

3. An aid to national program planners who can benefit from first hand knowledge of service delivery activities.

4. An aid to state Manpower planners to make possible more effective delivery of services.

5. The means to standardize the language used to describe worker activities so that more effective communication of service delivery information among states can occur.

While the first edition of the task bank contains introductory material which describes its development, the nature and composition require that users have a thorough knowledge of the use of functional job analysis in order to obtain full benefit from information in the task bank. Its distribution therefore will be relatively limited although no interested person will be deprived of access to the material. While all states will be advised of the availability of the task bank through SRS Regional offices, no general distribution of the bank itself is planned.

When the draft copy of the task bank was sent to SRS Administrations, Regional Offices, participating States and other interested persons and organizations for comments,

considerable interest in setup and maintenance of a National Task Bank was expressed. Several persons suggested that the bank should be maintained through the use of automatic data processing equipment. Preliminary investigations were made into the feasibility of such an undertaking. It was found that adequate machine capability exists, although provisions would have to be made for programing staff and for persons to perform editing functions and other management activities related to operation of the task bank. The nature and extent of these requirements would, of course, depend on the expected size of the task bank and the way in which it is used.

Since the initial input to the system is relatively small, numbering only five hundred and fifty tasks it was decided to begin operations in a manual mode rather than immediately undertake the development of a more sophisticated automated system.[1/]

1/ Planning for FY 1973 activities included use of consultants to study application of ADP techniques to National Task Bank management and funds for experimental machine runs. Money for these activities was cut from the budget.

As described earlier, the format of the task bank follows the McBee Card System used in the Upjohn Institute model. Consideration was given to publication of the National Task Bank on McBee Cards. This was not done for two reasons, lack of funds and the belief that many users would prefer to select their own method of data manipulation. The majority of these users will likely want a copy of the entire task bank, as well as access to content of a centralized bank. For them it will be necessary to provide a means of periodically updating their material.

This would also permit early exposure of many persons to the task bank concept and its content. They can then participate with OMDT in planning for future operations.

Issues and Options. Publication of the first edition of the task bank marks an experimental beginning for SRS of a program which appears to have a great deal of potential for future benefits to agencies, workers and clients. While the utility and validity of Functional Job Analysis and local agency task banks has been demonstrated, the concept of a National Task Bank needs to be tested.

The first edition, although limited in size and coverage, should be adequate for test purposes and for use by states beginning functional job analysis programs. Future use of the National Task Bank will depend in large part on expansion of existing and development of new functional job analysis programs in state and local agencies. These agencies are expected to develop task statements covering a wide range of activities in which workers are engaged. As more and more of these tasks are placed in the National Task Bank it will become more representative of the total range of work performed by persons delivering services and making money payments to SRS clients.

At this point a number of issues arise which deal with the future of this program. The most crucial of these concerns the continuation of state and local agency activities in the area of functional job analysis which result in the generation of task statements. Almost all of the FJA projects at the agencies which have contributed to the first edition of the task bank have been heavily supported through SRS resources (six of the participating states mentioned earlier in this paper were recipients of Public Service Careers monies,

over $325,000 of which was used to support functional job analysis activities). Without continued SRS support, it is not certain that states which have FJA projects will continue to work in this area. At this point SRS has the option of seeking new funds to support continuation of these programs or promoting their continuation through alternate funding resources available to the states, for example, regular matching funds under the Social Security Act or monies which will be available under Revenue Sharing. The obvious advantage of seeking continued direct federal funding for these programs would be to offer a substantial incentive to potential participants in new FJA programs and continuation by those who have already started. On the other hand, such support could also be considered at variance with the current administration policy of cutting down on direct federal expenditures. In these alternatives the merits of the FJA program itself would not necessarily be at issue.

Assuming that the above issue will be resolved, a second issue arises concerning organizational placement and management of the National Task Bank.

The aspects of this issue which relate purely to internal operations of SRS will be resolved within the normal course of management of SRS. For example, provision will be made for staff to operate the task bank, edit new material, update content, etc. However, if any of these matters affect access to the task bank by state agencies they become a matter for general concern. The possibility of future conversion of the task bank to ADP or its integration into the Automated Information Management System[1/] would be in the category. Open access to the task bank will be considered as essential to any such decisions. A third area of concern deals with the building of capacity for program expansion. Two SRS Administrations, the Assistance Payments Administration and the Community Services Administration have prepared guidance material[2/] for state agency use and have engaged in other program support activities.

The W.E. Upjohn Institute is revamping its training material in Systems Approach to Task Analysis and Job Design in a mediated format utilizing film strips, slide-sound projection, transparencies, workbook and printed material.

1/ A computer based information system being designed for SRS components including Research and Demonstrations, Grants Administration and Manpower Development and Training.
2/ op. cit. page 3 see footnotes 2 and 3.

A training package will be ready for use soon. This effort is being done with Upjohn money, and will be made available, at cost, to states and to Institutions of Higher Education.

SRS has contracted with Upjohn to provide two five-day training workshops, using the new material.

One group of trainees will be faculty people from a college or university in each Region. The purpose is to provide for a continuing educational resource in The Systems Approach that will be immediately available to state and local programs for primary training and as a source of continuing technical assistance.

A second group of trainees will comprise state manpower administrators in SRS related programs, who have not previously been involved in Task Analysis. The purpose of this workshop will be the training of a cadre of personnel in the techniques of Task Analysis and Job Design. The training will enable the trainees to adapt the National Task Bank to their individual local situation, and to develop and incorporate additional tasks to meet objectives. At the same time the National Task Bank is made available an Editing Manual will also be published by OMDT as an aid to

local agencies who want to make use of tasks in the National Task Bank by adapting them to local needs.

National Task Bank Uses. In addition to providing basic material for creation of state agency task banks, the National Task Bank can be used as an aid to resolving problems in the following areas:

1. Education provided by schools training workers does not satisfy agency needs because educational institutions do not train for task oriented functions of agencies. The National Task Bank would provide these institutions with specific task data drawn from many agencies on which to base redesign of curricula.
2. In-service training programs traditionally have not been developed on the basis of precise information on the knowledge and skill levels of workers needed to perform specific tasks. The National Task Bank can be used to develop guides for inservice training programs.
3. Many workers are locked into dead-end jobs. By using this task bank to develop proposed models for agency career lattices, opportunities for advancement can be suggested.

4. The auditing of federal financial participation in administrative costs encounters difficulties based on the vagueness of worker functions. Analysis of National Task Bank content will provide a basis for setting quantitative standards based on information provided by states themselves.

5. There is no valid means of estimating manpower requirements for a given agency function on a national basis. The National Task Bank can be used to identify Tasks required for a particular function, which then can be quantified in terms of estimated performance time and frequency.

Data	People	Things	Data	People	Things		Reas.	Math.	Lang.	
W.F. - LEVEL			W.F. - ORIENTATION			INSTR.	G. E. D.			TASK NO.
5B	5	1A	40%	55%	5%	5	5	3	4	

GOAL:

OBJECTIVE:

TASK: In unit meetings and/or individual conversations, discusses the unit's work responsibilities with staff, exchanging relevant facts, listening to reflective feelings, giving assignments and praise which relate to worker needs and unit requirements, encouraging individual initiative and cooperation in order to maintain unit staff motivation and work output at an acceptable level.

PERFORMANCE STANDARDS

Descriptive:

. Worker is encouraging, positive, supportive, firm, and articulate.
. Unit operations meet work output expectations.
. Assignments and directions are clear and within range of worker capabilities.
. The unit staff are cooperative and satisfied with work situations.

Numerical:

. Fewer than __% of staff complain of worker's manner/approach/attitude.
. Over a period of time, all unit objectives are met.
. Less than __% complaint that assignments are unclear or unrealistic.

TRAINING CONTENT

Functional:

. Principles of supervision.
. How to conduct staff meetings and converences.
. How to determine and make work assignments which appeal to worker need structures.
. How to convey information and listen and recognize worker feelings.
. How to stimulate worker self-development and cooperation.

Specific:

. Agency guidelines for worker, supervisor and unit relationships.
. Individual need structures of staff members.
. Unit work output requirements.

Task Bank Format
(For McBee Card use - see Page 4)